

FERS Time Chart

<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
<u>Thrift Program</u>	September 86	December 87
Announcement of Thrift Investment Options	January 86	February 87
Draft Thrift Form/Production	December 86	February 87
Identify Thrift Chief		
Modify Payroll/Withholdings	October 86	March 87
Education Program	February 87	May 87
Thrift Brochures	November 87	February 87
Coordination/Thrift Board	November 87	On-going
Conduct Open Season/Process Elections	February 87	May 87
Conduct 2nd Open Season	April 87	30 Sept 87
Draft Loan Application Form	August 86	October 87
Establish Loan Application and Review Procedure	July 87	December 87

<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
<u>OPM Coordination</u>	September 86	December 86
Initial Discussion of Issue	October 86	October 86
Check Writing Mechanism	October 86	December 86
Third Party Inquiries	October 86	December 86
Use of OPM EIN	October 86	December 86
Processing of Disability Cases	October 86	December 86
Certification Death Benefits/FEGLI	October 86	December 86
Certification Health Changes	October 86	December 86
CSA Numbers	October 86	December 86
Lump Sum Payment/Resignees	October 86	Open ended
Records - Transfers In/Out	October 86	December 86
Transfer of Funds	October 86	December 86
Coordination of Regulations (See Section on Regulations)	October 86	December 86

<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
<u>Regulations</u>	September 86	January 87
Draft Prepared	October 86	November 86
Internal OP Coordination	November 86	28 Nov
Agency Coordination	1 December 86	10 Dec 86
OPM Coordination	10 Dec 86	12 Dec 86
OMB Review	15 Dec 86	1 Jan 87
Oversight Committee Approval	15 Dec 86	1 Jan 87
Publication	1 Jan 86	March 86

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<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
<u>Education Program</u>	September 1, 86	July 87
<u>Briefings</u> - Basic Program	September 86	November 86
Hqs, NPIC	September 86	October 86
<div style="border: 1px solid black; width: 150px; height: 20px;"></div>	September 86	October 86
Thrift Program	January 87	April 87
Transfer Options	February 87	July 87
<u>Brochures</u>		
OPM Booklet on FERS	September 86	June 87
FERS Special Brochure	October 86	December 86
Should I Join	December 86	January 87
Thrift Program (See Thrift Section)	November 86	January 87
OPM Brochure on Changes	April 87	July 87
<u>Software</u>		
2 Basic Programs		
Comparison - PC	September 86	December 86
Comparison - Wang	October 86	February 87
Comparison - Mainframe	December 86	January 87
Optimizing Program	December 87	January 87
OPM Software	March 87	July 87

<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
<u>Automation</u>	August 86	December 88
Draft Requirements	September 86	November 87
Letter to Vendors	September 86	November 87
Requirements Review Working Group OIT	December 86	December 86
Requirements to Vendors	December 86	January 87
Vendor Proposals Reviewed	February 87	March 87
Vendor Selected	March 87	April 87
Project Manager Selected	March 87	April 87
Detailed Requirements and Specifications	April 87	December 87
Programming Initiated/Completed	July 87	December 88
Testing and Training	September 88	November 88
System Operational	December 88	

<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
<u>PC User Training</u>		
PC's Ordered/Installed	September 86	December 86
System Testing	December 86	December 86
System Activated	December 86	December 86
User Training	November 86	December 86

<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
<u>Open Season Transfers</u>	March 87	December 87
Announcement	April 87	May 87
Draft Application Prepared/ Approved	February 87	June 87
Application Disseminated/Returned	June 87	December 87
Transfer Brochure	February 87	May 87
Education Program	May 87	July 87
Conduct Open Season	July 87	December 87
Process Transfer Applications	July 87	January 88



<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
<u>In-house Retirement Processing</u>		
Processing of CSRS & FERS Retirement Cases	October 86	January 87
Processing of CSRS & FERS Disability Cases	October 86	January 87
Processing of CSRS & FERS Death Cases	October 86	January 87
Processing of Resignees/ Lump Sum Refund	October 86	January 87
Alternative Forms of Annuity/ Lump Sum	December 86	January 87
Certification of Death Benefits/ FEGLI	October 86	January 87
Handling Third Party Inquiries	October 86	January 87
Certification of Health Changes	October 86	December 86
Coordination of Regulations	November 86	December 86
Employee Review of Regulations	January 87	March 87
Transfer of Records from OPM	November 86	January 87
Obtain New CSA Numbers	October 86	December 86
Handling of Transfers In	October 86	December 86
Handling of Transfers Out	October 86	December 86
Transfer of NPRC Records	January 87	May 87
Integration of PC's into RD Operations	September 86	December 86
Reception & Set-Up of PC's	September 86	December 86
Training of Personnel on PC's	November 86	December 86
Introduction of Comparison Software	November 86	December 86
Introduction of Optimizer Software	December 86	December 86

<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
Coordinating with Other Agencies		
Social Security Administration	November 86	December 86
State Department	November 86	December 86
IRS	January 87	March 86
NPRC	January 87	April 86
FEGLI	December 86	January 86
NFC	November 86	July 87
Treasury Department	November 86	December 86
OPM (see separate sheet on OPM)	October 86	On-going

<u>Activity</u>	<u>Action Initiation Period</u>	<u>Completion Date</u>
<u>Contractor (Hustead) Actions</u>		
Briefing Handout	August 86	September 86
FERS Special Brochure	October 86	November 86
Problematics Brochure	October 86	December 86
Software	September 86	January 87
- Basic	September 86	December 86
- Optimizing	September 86	December 86
- Mainframe	September 86	January 87
- User Manual	September 86	December 86
Software Training	October 86	November 86
Thrift Brochure	February 87	March 87
Briefing of Component Personnel Officers	November 86	December 86